To be "clear and effective"

written material has to do *all* of the following things:

1 It must attract readers' attention

Members of your intended audience will make snap judgments about your written material, based on a quick glance. They may be in a hurry or distracted or uncomfortable with reading. Since you have only a few moments to convince them to read it, their first impressions are crucial: the topic and purpose should be clear; it should *look* appealing; it should *look* like it's worth reading; it should *look* like it's going to be easy to read.

2 It must hold their attention

To encourage people to keep reading, the material must seem worth the effort and it must be easy to follow. You don't want readers to give up because what initially caught their eye proved to be hard to read, distracting, confusing, or of no interest. To keep holding their attention, the material needs to seem personally relevant and be at the right level of detail for them.

3 It must make readers feel respected and understood

The material needs to be culturally appropriate, making readers feel that it was written for them. The information needs to fit with the readers' cultural knowledge, traditions, beliefs, and values. It needs to respond to their interests and experiences, and anticipate the kinds of questions or concerns they may have. It needs a friendly and supportive tone that puts readers at ease, making them receptive to the information.

4 — It must help them understand

Comprehension is crucial. You want your readers to be able to skim and pick up the main points, without stumbling over words they don't know or being distracted by the design. It needs to be easy for them to find and understand information of personal interest.

5 — It must help move them to take action

When you produce written material, it's for a reason – there is something you want your readers to do. Ultimately, what makes written material clear and effective is that people can read and use the information to do something that seems feasible and of value to them.

Source: *Making Written Material Clear and Effective, Part 1: A Guide to Writing, Design, and Translation,* written by Jeanne McGee for the Centers for Medicare & Medicaid Services. Draft manuscript March 2006; do not cite or quote or use in any way without written permission from Jeanne McGee.

Recommended websites

Provider's Guide to Quality and Culture

http://erc.msh.org   (to reach the site, follow the link on this page)

An outstanding resource for understanding and addressing the needs of culturally diverse populations. Includes audio clips, excerpts from publications, and a number of population-specific profiles. Topics include cultural competence, patient-provider communication, and health disparities. Extensive list of references and links.

DiversityRx

http://www.diversityrx.org

Great source of information about best practices, training courses, model programs, legal issues, and policy issues. It has a glossary and a section on demographics and statistics.

Cultural Diversity in Healthcare

http://ggalanti.com

Interesting and helpful website with cultural profiles, case studies, links to other websites, as well as recommended books, articles, and other information.

Tips for taking a reader-centered approach

- Be clear about the audience and goals for your written material.

- Do research to learn about your intended readers and the issues.

- Be aware of ways in which you differ from your intended readers and keep reminding yourself that you are writing for them, not yourself.

- Create "low barrier" material by adopting the perspective of your readers and fixing anything that might keep them from noticing, understanding, and using the material.

- Orient your writing and design toward the subset of your readers who are less attentive, less knowledgeable, and less skilled at reading.

- Recognize that "educating" your readers by giving them information you think they need will not automatically capture their interest or move them to action.

- Get insights into what your readers want and need to know by observing the settings and manner in which the written material will be used.

- Get help directly from your intended readers on what to say and how to say it.

- Write as if you were talking with your readers.

- To find out how well your materials are working, test them by getting reactions directly from your readers.
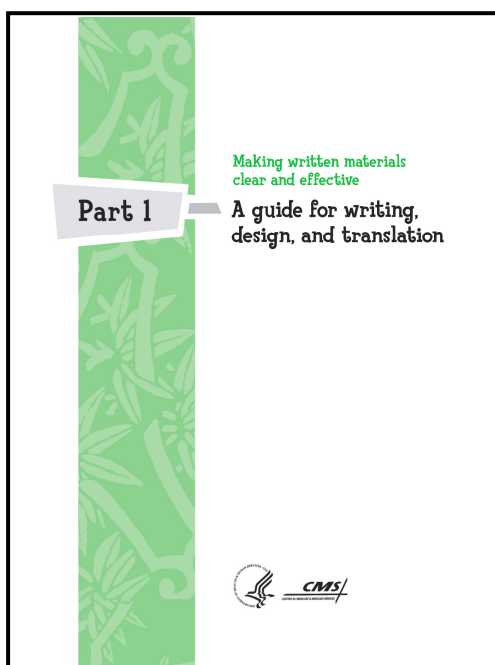
Coming in 2006 from the Centers for Medicare & Medicaid Services (CMS):

Making written material clear and effective

This new two-volume set of books by Jeanne McGee:

- Gives in-depth guidance on how to make written material easier for people to understand and use.

- Uses a reader-centered approach to address issues of health literacy, cultural and linguistic appropriateness, and the needs of audiences that include less-skilled readers and older adults.

- Stresses the impact of graphic design and the crucial importance of testing material directly with the intended readers.

- Is written in a friendly, non-technical style for people who have little or no formal training in plain language writing, document design, or research methods.

Making written materials clear and effective
Part 1 — A guide for writing, design, and translation

Making written materials clear and effective
Part 2 — Methods for testing materials with readers

- Explains how to use a reader-centered approach to address issues of health literacy, culture, and reading skills of your audience.

- Offers detailed guidelines for clear and effective writing, document design, and language translation.

- Explains how to apply the guidelines, using many examples that include a before-and-after makeover on how to revise a brochure.
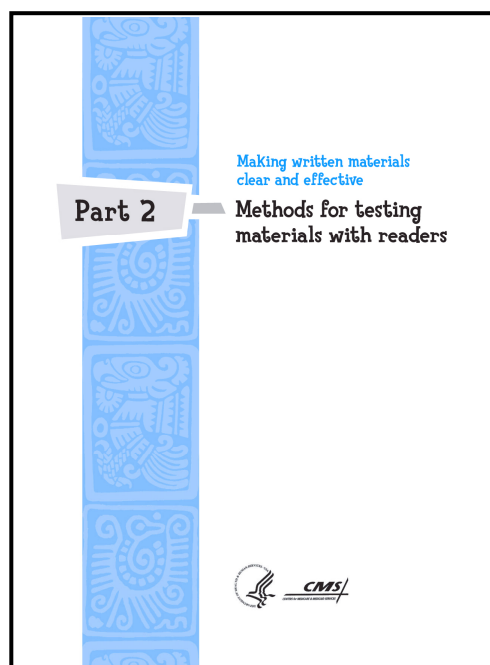
- Gives step-by-step guidance on how to use interviews and focus groups to get feedback directly from readers and use it to improve written material.

- Covers a number of methods, including cognitive interviewing and usability testing.

- Discusses practical arrangements, including how to select and recruit participants.

Update of a 1999 CMS guide

The new set of books is the updated and expanded second edition of the 1999 CMS guide shown below (*Writing and Designing Print Materials for Beneficiaries: A Guide for State Medicaid Agencies):*
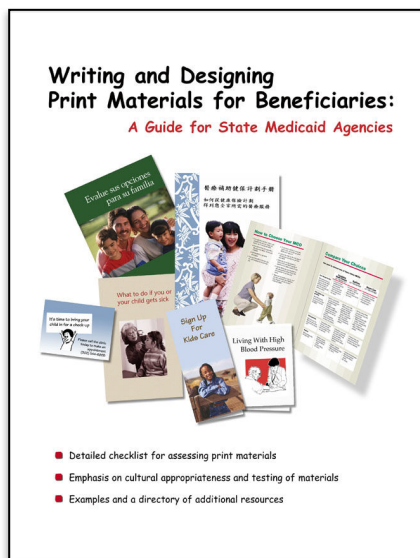
What has changed in the new edition?

This new edition will help CMS employees, CMS partners, beneficiary advocates, other HHS agencies, state agencies, contractors, and other health agencies communicate more effectively with the audiences they serve:

- **It's more inclusive.** The new edition expands the scope of the original guide to include Medicare and the State Children's Health Insurance Programs (SCHIP) as well as Medicaid.

- **It adds new topics,** including things to know if your material is for older adults, and using websites to distribute written material.

- **It expands on some topics.** For example, the original guide's chapter on methods of testing material with readers has been expanded into a separate volume. Other topics covered in greater detail include language translation, use of visuals, page layout, and other aspects of graphic design.

When will the new set of books be available?

- **Release date.** CMS plans to release this new set of books in 2006. Though the date for release has not been set, it will likely be in the Fall.

- **Printing and distribution.** Plans for printing and distribution are still in progress and they include some form of website distribution. Most likely, book chapters will be available in PDF format to download and print from a website.

- **Notification list.** To add your name to the list of people to be notified when the new set of books is released, please send an email to one of the CMS project officers or to the author (see contact information on the right).

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Making written materials clear and effective

Part 1 — A guide for writing, design, and translation

Background

1. This Guide and how it can help you

2. Is written material appropriate for your audience and purpose?

A reader-centered approach to developing and testing written material

3. What are "Basic Level" literacy skills?

4. Using a reader-centered approach to develop and test written material

5. Tips for making written material culturally appropriate

6. Things to know if your written material is for older adults

Introducing the Guidelines for Writing, Design, and Translation

7. What are the *Guidelines for Writing, Design, and Translation*, and how can you use them?

8. Guidelines for websites

Guidelines for clear and effective writing

9. Guidelines for content of your written material

10. Guidelines for organizing the content (sequencing, grouping, and labeling)

11. Guidelines for writing style

12. Using formulas to measure the reading grade level of written materials

13. Guidelines for engaging, motivating, and supporting your readers

Guidelines for clear and effective document design

14. Tips for learning about design and working with design professionals

15. Guidelines for overall design and page layout

16. Guidelines for fonts, size of print, and contrast

17. Guidelines for headings, bulleted lists, and emphasizing blocks of text

18. Guidelines for use of color

19. Guidelines for use of photographs, illustrations, and clip art

20. Guidelines for tables, charts, and diagrams

21. Guidelines for forms and questionnaires

A "before and after" example of revising written material

22. Using this book's guidelines to revise a brochure

Guidelines for translation of written material

23. Guidelines for culturally and linguistically appropriate translation

Tips for saving time and money

24. Tips for developing written material in efficient and cost-effective ways

Bibliography and list of resources

25. References and resources cited in this guide

Making written materials clear and effective

Part 2 — Methods for testing materials with readers